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ABSTRACT

This paper summarizes a Master's project designed for principals who are interested in pursuing instructional leadership in their schools. The first part provides the principal with an overall understanding of, and rationale for, the role of the principal as instructional leader. The second part, written in the format of a handbook, describes the knowledge base that principals need to acquire, the tasks that must be accomplished, and the interpersonal and technical skills necessary for carrying out instructional leadership. The handbook was developed to introduce principals to the changes required in becoming effective instructional leaders. Among the tasks described are instructional evaluation and supervision, peer coaching, staff and group development, action research, and curriculum implementation. Four figures are included. Appendices contain an instructional framework, a supervisory beliefs inventory, an instructional-development plan, the five steps of clinical supervision, information on group roles, and descriptions of interpersonal/supervisory approaches. (Contains 67 references.) (LMI)

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ED 391 222

RESEARCH IN BRIEF

Introducing Principals to the Role of Instructional Leadership

SSTA RESEARCH CENTRE REPORT: #95-14 DATE: Nov 1995

This report is a summary of a master's project by Jan Chell.

The project is directed toward those principals interested in pursuing instructional leadership in their schools. Part A - The Role of the Principal as Instructional Leader, provides the principal with an overall understanding of, and rationale for, the role of the principal as instructional leader. Part B - A Handbook to Introduce Principals to the Knowledge Base, Skills and Tasks of Instructional Leadership, provides more specific understandings with respect to the knowledge base principals need to acquire, the tasks which must be accomplished, and the skills needed in carrying out instructional leadership.

This handbook was developed to introduce principals to the changes required to become effective instructional leaders. It provides a ready resource that conceptualizes instructional leadership, establishes its importance, and introduces both the knowledge and skills required for the principal to become an effective instructional leader.

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FOREWARD

This project is directed toward those principals interested in pursuing instructional leadership in their schools. The two parts of the project are described below and may be used separately or together. It is suggested, however, that principals first become familiar with the general concepts in Part A before moving on to the more specific material in Part B.

Part A

The Role of the Principal as Instructional Leader

This review of the literature provides the principal with an overall understanding of, and rationale for, the role of the principal as instructional leader.

Part B

A Handbook to Introduce Principals to the Knowledge Base, Skills and Tasks of Instructional Leadership

The Handbook provides more specific understanding with respect to the knowledge base principals need to acquire, to the tasks which must be accomplished, and to the skills needed in carrying out instructional leadership.

This project is a review of the literature on the role of the principal or instructional leader and a synthesis of the key components needed to become an effective instructional leader. This information-based project did not require approval from the Ethics Committee, Faculty of Graduate Studies and Research, University of Regina.

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PART A

THE ROLE OF THE PRINCIPAL AS INSTRUCTIONAL LEADER

CHAPTER 1: INTRODUCTION

Fullan (1991) makes the statement that "The role of the principal has become dramatically more complex, overloaded, and unclear over the past decade" (p. 144). Indeed, the role of the principal has been in a state of transition, progressing from the principal as an instructional leader or master teacher, to the principal as a transactional leader and, most recently, to the role of transformational leader.

Much has been written in the literature (Berlin, Kavanagh, & Jensen, 1988; Flath, 1989; Fullan, 1991; McNally, 1992; Stronge, 1988) concerning the importance of the instructional leadership responsibilities of the principal. Clearly, improved education for our children requires improved instructional leadership.

CHAPTER 2: BACKGROUND INFORMATION

Many researchers (Brookover & Lezotte, 1982; Duke, 1983 [cited in Flath, 1989]; Edmonds, 1979 & Kroeze, 1984 [cited in Flath, 1989]) stress the importance of the instructional leadership responsibilities of the principal; however, the consensus in the literature regarding this issue is that it is seldom practiced (Flath, 1989). Stronge (1988) calculates that 62.2% of the elementary principal's time is focused on school management issues, whereas only 6.2% of their time is focused on program issues. He adds, "a typical principal performs an enormous number of tasks each day - but only 11% relate to instructional leadership" (p. 32). Berlin, Kavanagh, and Jensen (1988) conclude that, if schools are to progress, "the principal cannot allow daily duties to interfere with the leadership role in curriculum" (p. 49).

Although McNally (1992) points out that practitioners and researchers agree that certain principals are effective, Fullan (1991) adds that "effective instructional leaders are distinctly in the minority" (p. 151). Stronge (1988) concludes that "if principals are to heed the call from educational reformers to become instructional leaders it is obvious that they must take on a dramatically different role" (p. 33).

Evidently, there is an apparent gap between what is and what needs to be. Why are we experiencing this dilemma? In response, Flath (1989) outlines what most researchers have to say concerning this dilemma. Mention is made of the lack of education, training, and time for the instructional leadership role; of leadership activities being set aside for more immediate problems; and of the increasing volume of paper work. Also, public expectations for the principal's role are mainly managerial and, to a principal, this is a safe and comfortable role.

CHAPTER 3: WHAT EFFECTS CHANGE?

As instructional leader, the principal is the pivotal point within the school who affects the quality of individual teacher instruction, the height of student achievement, and the degree of efficiency in school functioning. Thus, current literature will be referred to, concerning what makes for effective leadership. What are the qualities of effective instructional leaders or, perhaps more importantly, how can these qualities be developed? Research findings vary greatly here; however, there are common threads that emerge throughout the research which can begin to answer these questions and a discussion of these follows.

Findley and Findley (1992) state that "if a school is to be an effective one, it will be because of the instructional leadership of the principal" (p. 102). Flath (1989) concurs: "Research on effective schools indicates that the principal is pivotal in bringing about the conditions that characterize effective schools" (p. 20). Ubben and Hughes (cited in Findley & Findley, 1992) claim that "although the principal must address certain managerial tasks to ensure an efficient school, the task of the principal must be to keep focused on activities which pave the way for high student achievement" (p. 102). If our goal is to have effective schools, then we must look at ways to emphasize instructional leadership.

How, then, do we change what is, to what should be? Firstly, there must be an understanding of the meaning of the term *instructional leader* and, secondly, there must be an examination of what leadership qualities are needed and what actions are necessary to fulfill this role. A discussion of these two areas follows.

Understanding the meaning of the term *instructional leadership* presents a problem. Many writers acknowledge there is no succinct definition of instructional leadership, nor are there any

specific guidelines or direction as to what an instructional leader does (Flath, 1989). Thus, writers use their own definition and, as a result, meanings vary considerably from one practitioner or researcher to another. Flath makes mention of this in her research:

> T. D. Bird and J. W. Little do distinguish between educational leadership and instructional leadership. They say that educational leadership describes those initiations that attempt or tend to preserve or produce a favorable educational ethos within the school, while instructional leadership refers to the specific branch or educational leadership that addresses curriculum and instruction. (p. 19)

She also cites Acheson and Smith:

> According to K. A. Acheson and S. C. Smith, an instructional leader is an administrator who emphasizes the process of instruction and facilitates the interaction of teacher, student and curriculum. (p. 20)

And, Mendez (cited in Flath, 1989) describes it yet another way:

> There are three major forces that serve to shape and describe a school - the public, the staff and the students - and that these forces interact through the curriculum. The role of the instructional leader is to manipulate these forces in order to maximize the quality of instruction. (p. 20)

In examining instructional leadership qualities, one finds that, here also, the research varies. Duke (cited in Flath, 1989) concluded from his research on instructional leadership qualities that "there is no single leadership skill or set of skills presumed to be appropriate for all schools or all instructional situations" (p. 20). On the other hand, Kroeze (cited in Flath, 1989) found that certain instructional leadership activities could be grouped together and they are presented in the following four categories:

1. Goal emphasis. Set instructional goals, high expectations and focus on student achievement.
2. Coordination and organization. Work for effectiveness and efficiency.
3. Power and discretionary decision making. Secure resources, generate alternatives, assist, and facilitate to improve the instructional program.
4. Human relations. Deal effectively with staff, parents, community, and students. (p. 20)

However, throughout the literature there are recurring themes on instructional leadership qualities and a perusal of the research of several well-known authors in this field follows. Baskett and Miklos (1992) present a person-centred leadership approach which emphasizes a sensitivity to working with teachers, peers, superordinates and members of the public. Also, there is the work of Rutherford (cited in Anderson & Pigford, 1987) who mentions five general leadership qualities of effective leaders.

1. Have a vision. Work toward a shared understanding of the goals, progress toward their achievement and coordinate curriculum, instruction and assessment.
2. Translate the vision into action. Work as a team, emphasize school wide goals and expectations.
3. Create a supportive environment. Promote an academically-oriented, orderly, and purposeful school climate.
4. Know what's going on in the school. Find out what teachers and students are doing and how well.
5. Act on knowledge. Intervene as necessary accommodating different teacher personalities, styles, and teaching strategies. (pp. 67-68)

In addition to these leadership qualities aforementioned, Fullan (1991) found in his research that "schools operated by principals who were perceived by their teachers to be strong instructional leaders exhibited significantly greater gain scores in achievement in reading and mathematics than did schools operated by average and weak instructional leaders" (p. 156). Thus, perception could be a included as a strong determinant of effectiveness.

Some authors (Glickman, 1985; Smyth, 1988; Wiles & Bondi, 1986 [all authors cited in Haughey & MacElwain, 1992]) emphasize instructional supervision[1] as a fundamental component of instructional leadership, viewing this role as imperative to improved instruction and student achievement. Haughey and MacElwain (1992) point out that there is general agreement among

[1]Practitioners and researchers differ widely in their perspectives on instructional supervision as part of instructional leadership.

writers that the focus of instructional supervision is the enhancement of student learning but it is in the practice of instructional supervision that they differ (p. 106). These authors point out some of the areas in which researchers differ.

> Wiles and Bondi (1986) defined supervision as a 'general leadership function that coordinates and manages those school activities concerned with learning.' (p. 10). . . . Other writers (e.g., Glickman, 1985; Smyth, 1988) stress the importance of the involvement of the teachers in the process. . . . Sergiovanni (1987) . . . presented a reflective model of supervision in which he proposed that since teachers vary in their goals and learning styles, supervisors should be responsive to these differences in the ways they supervise. (pp. 105-106)

Whereas,

> Morris, Crowson, Porter-Gehru, and Heurwitz (1984) . . . concluded, "the principal's influence, though, may be more indirect, creating a favorable climate for learning: the most effective role may be supportive rather that supervisory or evaluative. (p. 106)

The issues of both instructional improvement and accountability are addressed in an interesting supervision model developed by Dagley and Orso (1991). Their two-part model works in a cyclical fashion. One part is a summative evaluation to determine if minimal standards of accountability are met; the other is a formative evaluation which focuses on growth and improvement. The two parts operate cyclically such that if minimal accountability standards are met, teachers move immediately to the formative side of model where they focus on improving a targeted teaching area. Once completed, teachers can return to the formative side to work on another target area or move to the summative side to begin a new cycle. If accountability standards are not met, teachers are either terminated or enter intensive assistance. Once intensive assistance is completed successfully, they can reenter the cycle at the formative side.

An area integral within all instructional leadership or supervision models is that of planning in-service training or staff development. Well-recognized models include the work of Joyce and

Showers' (cited in Dagley & Orso, 1991, p. 72) theory, practice, feedback and coaching to application, as well as Goldhammer's (cited in Dagley & Orso, 1991, p. 75) five steps of clinical supervision that include preobservation conference, analysis of observation, postobservation conference, and planning for improvement.

An additional criterion for instructional leaders, often mentioned in research, is that the principal should also be a practicing teacher. Weindling (1990) states that head teachers in the United Kingdom indicated that "the most important thing contributing to instructional leadership was the fact that all continued to teach for an average of about 20 percent of the week" (p. 42). Harden's (1988) research outlines why this is important. To have credibility, principals need to work closely with students, developing teaching techniques and methods as a means for understanding teacher perspectives and for establishing a base on which to make curricular decisions. Also, a teaching principal strengthens the belief that "the sole purpose of the school is to serve the educational needs of students" (p. 88).

CHAPTER 4: THE ROLE OF THE PRINCIPAL TODAY

As previously discussed, the role of the principal is in a state of transition. This discussion of the literature now turns to view the principal's position today in this continuum of role change and includes the perceived directions that this role will take in tomorrow's schools.

In today's world, Hanny (1987) perceives that "effective principals are expected to be effective instructional leaders . . . the principal must be knowledgable about curriculum development, teacher and instructional effectiveness, clinical supervision, staff development and teacher evaluation" (p. 209). Bryce (1983) and Fullan (1991) agree with this holistic view of the principal's role. However, Fullan expands this holistic definition of leadership and management to be: an active, collaborative form of leadership where the principal works "with teachers to shape the school as a workplace in relation to shared goals, teachers collaboration, teacher learning opportunities, teacher certainty, teacher commitment, and student learning" (p. 161).

This collaborative nature of leadership is often stressed in the literature. Bernd (1992) states that "increased teacher involvement in school decisions are (sic) effective tools for focusing the staff on students outcomes" (p. 68). Hallinger (1989) speaks of leadership teams at the secondary level to help carry out the critical functions of curriculum and instructional coordination and supervision. Cooper (1989) states that schools need to create models of shared leadership which incorporate the talents and energy of principals, teachers, students, and parents.

> This mode of instructional leadership provides for learning and working with others - teachers, students and parents - to improve instructional quality. . . It is their responsibility to create a strong school culture, enabling teachers to collaborate with them in redesigning the instructional program so that all students can learn. (p. 16)

Fullan (1991) perceives the role of the principal, in models of the future, will be to encourage collaborative groupings of teachers to play a more central role in the instructional leadership of the school. This, however, will require active participation of the principal to facilitate change by motivating the staff and students, by reaching out to the community, and by continually improving the school. The assumption inherent, here, is that effective leaders manage and lead (Fullan, 1991; Moorthy, 1992). Highsmith and Rallis (1986) appear to disagree with the above statements by stating that "school management and instructional leadership are two separate tasks that cannot be performed by a single individual" (p. 300), but they strongly agree with the idea of teacher empowerment where teachers have significant input into decisions concerning instruction, arguing that well managed schools "enable real instructional leaders to empower teachers who can create the effective schools reformers are seeking" (p. 304).

Of interest, the role of women as instructional leaders is highlighted in the research of Highsmith and Rallis (1986) who found that, "as a group, women are more likely to evidence behavior associated with effective leadership" (p. 163). The results of their study showed that women spend more time on educational program improvement activities than do males. They are more attuned to curriculum issues, instructional leadership, teachers concerns, parent involvement, staff development, collaborative planning strategies, and community building. Shakeshaft concurs with their findings: "women are more likely to possess characteristics associated with effective leadership and effective schooling" (cited in Fullan, 1991, p. 163). Ironically, the research of Smith (1991) reveals that "although about 60% of Canadian teachers are women . . . about 16% of school principals are women" (p. 198). It is apparent that further changes need to be made by both men and women.

CHAPTER 5: THE PROCESS OF BECOMING

> From the external perspective, the problem will be solved when the external factors have been changed - when job descriptions have been rewritten. . . . Thus, the recommendations made . . . will be concerned with the reconceptualization of the job of principal, the need for additional personnel to fulfill the additional administrative responsibilities. (Anderson & Pigford, 1987, p. 69)

Society is beginning to recognize that the role of the principal has undergone change. Evidence of this will be found within the expectations of the local school divisions and the school boards, and these expectations will settle into the schools themselves. A recent example of this occurred in Alberta (Jesse, 1989). Here, the Trustee's Association adopted a "Role of the Principal" statement that limited the principal's role to the primary functions of instructional and curricular supervisor, overseeing program and professional development and public relations.

Change is a slow process and it takes times for society to change its views concerning a principal's functions; but, more importantly, change needs to occur within the thinking and beliefs of principals or, as Fullan (1991) expresses this, "The starting point for improvement is not system change, not change in others around us, but change in ourselves" (p. 167). Anderson and Pigford (1987) speak of this need for change within the individual principal.

> From the internal perspective, on the other hand, the problem will be solved when principals change - when they heartily endorse their role as instructional leader and develop a set of skills that permit them to function effectively in that role. (p. 69)

Educational research has much to say about the importance of reflection and of journal keeping, for it is through reflecting and writing about our instructional methods that change will occur. Thus, it is critical that principals become reflective practitioners. For example, they need to reflect on their conception of their role as principal, actively questioning its limitations, expectations,

functions and so forth (Fullan, 1991). It will be through reflection that they will clarify their role and determine what really needs attention (Vornberg, 1988).

Professional development for principals is a continuous process of learning and of becoming. Hallinger, Greenblatt, and Edwards (1990) state that principals need "the opportunity to explore and update skills in leadership, curriculum, supervision, instruction and management" (p. 9). They present this opportunity through use of their Visiting Practitioner Model. Also, Carter and Klotz (1990) view universities as institutions that could be of great service to the learning needs of principals by offering "degrees in educational administration that combine academic study and clinical work; and revamp curricula to include a common core of knowledge and skills that all educational administrators must have. . . including a sound understanding of teaching and learning theory" (p. 37).

CHAPTER 6: CONCLUSION

> The decision a principal makes concerning the issue of instructional leadership and the extent to which that principal develops the skills needed to exercise appropriate instructional leadership will influence what does or does not happen in classrooms throughout the country. (Anderson & Pigford, 1987, p. 71)

The importance of the instructional leadership responsibilities of the principal cannot be ignored, nor can the reality that good leadership skills are seldom practiced. Principals require information and skills in order to support practices of instructional leadership in their schools. They need to know what effective instructional leadership is and how to become an effective instructional leader.

The accompanying Handbook (Part B), entitled *A Handbook to Introduce Principals to the Knowledge Base, Skills, and Tasks of Instructional Leadership*, was developed to introduce principals to the changes required. Principals need to become effective instructional leaders and this Handbook provides a ready resource that conceptualizes instructional leadership, establishes its importance, and introduces both the knowledge and the skills required for principals to become effective instructional leaders.

PART B

A HANDBOOK TO INTRODUCE PRINCIPALS TO THE KNOWLEDGE BASE, SKILLS, AND TASKS OF INSTRUCTIONAL LEADERSHIP

CHAPTER 7: WHY A HANDBOOK ON INSTRUCTIONAL LEADERSHIP?

My primary goal, as principal of a rural school in Saskatchewan, is to promote growth in student learning. This could necessitate change in individual classroom instruction. How does a principal become an instructional leader who can effect positive change within the school? What skills and knowledge are required to fulfill this role? This is a complex, multidimensional task, one without a blueprint. Certainly, there is a need for some direction.

This Handbook was developed to address such questions and to provide some concrete guidance. It will outline, as depicted in Figure 1, the tasks to be undertaken, the skills of effective instructional leadership, and the underlying knowledge base. This base includes knowledge: of the research on effective schools, of instructional practices and administration; of assessing the strengths

INSTRUCTIONAL LEADERSHIP

AREAS OF LEARNINGS	**KNOWLEDGE BASE**	**TASK UNDERSTANDINGS**	**APPROPRIATE SKILLS**
	Effective schools literature Research on effective teaching Awareness of one's educational philosophy and beliefs Administrative development Change theory	Supervision/Evaluation of instruction Staff development Curriculum implementation/Core curriculum Group development	INTERPERSONAL/LEADERSHIP • Communication • People • Interpersonal/Supervisory • Group decision-making guidelines
DIMENSIONS	Knowledge of curriculum development	Action research Positive school climate School and community	TECHNICAL • Goal setting • Assessing and planning • Observing • Research and evaluation

PRODUCTS **IMPROVED STUDENT LEARNING**

Figure 1. Framework outlining areas of learning including internal dimensions needed to effect improved student learning. Saskatchewan Education. (1991)

and weaknesses in one's personal educational philosophy and beliefs; and of the process of change.

Tasks to be accomplished encompass those of supervision and evaluation of instruction, of staff development activities, of curriculum development knowledge and activities, of group development knowledge and activities, of action research, of development of a positive school climate, and of the creation of links between school and community.

The skills of an effective instructional leader are separated and discussed as two categories: the technical and the interpersonal. Technical skills include goal setting, assessment and planning, instructional observation, research and evaluation; whereas, interpersonal skills are those of communication, motivation, decision making, problem solving, and conflict management.

This Handbook will provide a ready resource for those principals committed to delivering quality education within their schools. It is, then, an introduction - a beginning - as there is a whole career ahead in recognizing and developing the learning.

7.1 DEFINING INSTRUCTIONAL LEADERSHIP

> Instructional leadership encompasses "those actions that a principal takes, or delegates to others, to promote growth in student learning" (Debevoise, 1984, pp. 14-20) and comprises the following tasks: defining the purpose of schooling; setting school-wide goals; providing the resources needed for learning to occur; supervising and evaluating teachers; coordinating staff development programmes; and creating collegial relationships with and among teachers. (Wildy & Dimmock, 1993, p. 44)

The term *instructional leader* clearly describes the primary role of the principal in the quest for excellence in education. To achieve this quest, it will take more than a strong principal with concrete ideas. According to Richardson et al. (1989), he or she must lead toward educational achievement, must be a person who makes instructional quality the top priority of the school, and must be able to bring that vision to realization.

Most writers acknowledge there is no single definition of instructional leadership nor specific guidelines or direction as to what an instructional leader does (Flath, 1989). However, they create their own definitions and, as a result, meanings vary considerably from one practitioner to another and from one researcher to another. This lack of consistency in definition then becomes part of the problem. As Cuban (1984) expresses it: "Road signs exist, but no maps are yet for sale" (p. 132). However, to enlarge our understanding, the discussion now turns to examine the role of an effective instructional leader in today's schools.

7.2 THE ROLE OF THE PRINCIPAL TODAY: MANAGER OR INSTRUCTIONAL LEADER?

An experienced principal once told me that the principal is responsible for three "*p*'s" in the school: the *p*eople, the *p*rogram, and the *p*lant. It sounded too simple; yet, in retrospect, he may have been right. However, experience has also taught me the complexity of each one of those categories. There are managerial and instructional issues to be dealt with in all categories. For example, when ordering new desks, one will be concerned about their maintenance and repair (managerial) and, as well, about their functionality in grouping arrangements for instructional purposes (instructional). Effective principals are managers and instructional leaders - both roles are essential.

Moorthy (1992) separates managerial functions into the three areas of planning, organizing, motivating and controlling (p. 8). Instructional leadership functions involve all the beliefs, decisions, strategies, and tactics that principals use to generate instructional effectiveness in classrooms. Managers focus on "running a smooth ship"; instructional leaders focus on learning and instruction. Although the role of the principal as instructional leader is pivotal in developing an effective school,

principals can not be effective instructional leaders if they are not good managers. These are viewed as supporting roles; not as isolated entities.

7.3 INSTRUCTIONAL LEADERSHIP TODAY

The consensus in the literature is that principals spend most of their time dealing with managerial issues. Although the role of the principal as instructional leader is widely advocated, it is seldom practised. The principal's role is still, primarily, that of a manager. Stronge (1988) calculated that elementary school principals spent 62.2% of their time on managerial issues and 11% on instructional leadership issues, even after undergoing training or in-service for the role of instructional leader. Hallinger (1989) attributes this reality to the fact that there has been little or no provision for enhancing or supporting these new skills in the instructional leadership domain. Technical assistance, adjustment in role expectations, and policies designed to support the use of this new knowledge and skills are, for the most part, lacking. Thus, the image of instructional leadership has become entrenched in the professional rhetoric but all too often is lacking in administrative practice.

7.4 INSTRUCTIONAL LEADERSHIP TOMORROW

Smylie and Conyers (1991) conclude that teaching has become a "complex, dynamic, interactive, intellectual activity . . . (not a practice that can be) prescribed or standardized" (p. 13). In order to meet the rapidly changing needs of our students, teachers must be given the authority to make appropriate instructional decisions. They are the instructional experts. Therefore, the basis for school leadership must include teachers (and parents), as well as the principal, in the role of problem finding and problem identification, a process currently referred to as *transformational leadership*.

Principals, then, become the leaders of leaders: those who encourage and develop instructional leadership in teachers. According to Cooper (1989), this "mode of instructional leadership provides for learning and working with others - teachers, students and parents - to improve instructional quality" (p. 16). This becomes the basis for shared instructional leadership.

This restructuring requires a different view of leadership. School goals would be based on problems identified by teachers and parents - not on a principal's personal vision nor one of the central office. There would be a greater emphasis on problem finding and goal setting by staff and community. Problem solving would be a collaborative activity. Collegiality, experimentation, teacher reflection, and school-based staff development become important issues. Rather than being the source of all knowledge, the principal's role would be to tap the expertise and leadership of teachers. The idea that one model of school leadership or one model of classroom instruction is appropriate for all schools is incompatible with this form of school-based restructuring and improvement. It becomes apparent that school leaders will require a greater tolerance for ambiguity then ever before.

The principal becomes a key player. Even if this approach is collaborative in nature, the leadership taken by the principal is pivotal. Therefore, there is much the principal must know and do in order to become an effective instructional leader.

7.5 BECOMING EFFECTIVE INSTRUCTIONAL LEADERS

Although "instructional leadership conveys a meaning which encompasses only a portion of those activities now associated with effective school leadership" (Leithwood, Begley & Cousins, in press), it is still the most important portion. Improved student learning is the primary goal.

Glickman (1990) has much to say about how to become an effective instructional leader. Using his works as the base, and including the research findings of others, effective instructional leadership is comprised of the following three major categories and subcategories.

1. **Knowledge Base**
   - Effective schools literature
   - Research on effective speaking
   - Awareness of your own educational philosophy and beliefs
   - Administrative development
   - Change theory
   - Knowledge of curriculum theory/core curriculum

2. **Tasks**
   - Supervision/evaluation of instruction
   - Staff development
   - Curriculum development
   - Group development
   - Action research
   - Positive school climate
   - School and community

3. **Skills**
   - Interpersonal
   - Communication
   - People
   - Decision-making
   - Application
   - Problem solving/conflict management
   - Technical
   - Goal setting
   - Assessing and planning
   - Observing
   - Research and evaluation

CHAPTER 8: KNOWLEDGE BASE NEEDED

8.1 EFFECTIVE SCHOOLS LITERATURE

To have instructionally effective schools, proponents of effective schools literature have hypothesized there must be:

1. clear, focused mission (although all schools adopt multiple goals, the goals to ensure academic excellence and to educate all students are nonnegotiable in instructionally effective schools)
2. strong instructional leadership by the principal
3. high expectations for students and staff
4. frequent monitoring of student progress
5. a positive learning climate
6. parent/community involvement
7. an emphasis upon student attainment of basic skills. (Bamburg & Andrews, 1990, p. 3)

Glickman (1990) states that every major research study on successful schools has noted the organizational phenomenon of collective action, agreed-on purpose, and belief in attainment (see Pratzner, 1984; Rosenholts, 1985; [cited in Glickman]). This occurs when teachers perceive themselves "as part of the larger enterprise of complementing and working with each other to educate students. [Teachers have] a cause beyond oneself" (p. 21).

Bamburg and Andrews (1990) believe that to be an effective instructional leader, one must:

1. have a vision for the organization that is clearly focused upon desired outcome (i.e., "ensuring academic excellence")
2. communicate that vision to everyone connected with the organization to obtain support for it
3. provide and/or obtain the resources needed to accomplish the vision (i.e., materials, information, or opportunity)
4. manage oneself so the above can occur. (p. 29)

Their research on effective schools strongly suggests that instructionally effective schools have principals who are viewed by their teachers as the primary instructional leader in the school. They

developed an operational definition of instructional leadership behaviour. The behaviours were found to be a set of strategic interactions that Bamburg and Andrews (1990) grouped as:

1. A resource provider that: (a) marshals personnel and resources to achieve a school's mission and goals, and (b) is knowledgeable about curriculum and instruction.

2. An instructional resource that: (a) sets expectations for continual improvement of instructional program and actively engages in staff development, and (b) encourages the use of different instructional strategies.

3. An effective communicator that: (a) models commitment to school goals, (b) articulates a vision of instructional goals and the means for integrating instructional planning and goal attainment, and (c) sets and adheres to clear performance standards for instruction and teacher behaviour.

4. A visible presence that: visits classrooms, attends departmental or grade-level meetings, is accessible to discuss matters dealing with instruction, is an active participant in staff development. (pp.17-19)

8.2 RESEARCH ON EFFECTIVE TEACHING

The research on effective teaching tells us how to accomplish certain tasks. However, as Glickman (1990) points out, it does not tell us which is the best way. Schools or school systems must first choose goals according to what is best for their students. For example, should higher achievement scores in reading and mathematics be gained at the expense of studying science, art, and music? Once goals are set, research on effective teaching that is congruent with our goals can then be applied in the most effective manner.

In the current research on effective teaching, there are some generalities to be noted. Glickman (1990) concludes that "It is inappropriate to view explicit, direct instruction as the model for effective teaching, valid for the majority of instruction in a classroom" (p. 80). Rosenshine (cited

in Glickman, 1990, p. 80) estimated direct instruction should account for 40% of teaching, at most, and yet it remains the most used instructional strategy.

Then what instructional model should be used? It will depend on the school's goals. Using these as a guide, teachers must make informed decisions as to the most appropriate instructional model(s). Effective instruction, then, is the ability to use a variety of teaching methods according to a variety of learning goals and outcomes (see Appendix A).

According to Porter and Brophy (1988), effective teachers:

1. understand their instructional goals
2. design instruction according to these goals
3. communicate goals to students
4. create learning situations and use a variety of instructional approaches to promote creative thinkers, as well as factual learners
5. reflect
6. evaluate themselves. (p. 74)

All these goals are performed in order to increase student's decision-making capabilities - the ultimate goal in teaching.

8.3 EDUCATIONAL PHILOSOPHY AND BELIEFS

To be objective concerning one's role as instructional leader, a principal must factor the knowledge of effective schools and effective teaching into his/her own educational philosophy and beliefs. If the school's goal is instructional improvement, how does the principal achieve this? Is one strategy preferred over others? Are there other, more effective methods? Here, the three major educational philosophies proposed by Glickman (1990) are relevant.

1. Essentialism. The supervisor holds the knowledge about absolutes or truths in teaching which he/she imparts to teachers to systematically improve their teaching.

2. Experimentation. Supervisors work democratically with teachers to achieve collective ends helpful to everyone. They convey knowledge of teaching and encourage exploratory learning as well.

3. Existentialism. Individual teacher freedom and choice is paramount. Supervisors do not import knowledge or guide; they help only when needed/asked.

Glickman's (1990) educational philosophies relate to an individual's belief system and to a corresponding method of supervision.

> *Directive supervision* is based on the premise that teaching is a science with known skills and standards. The supervisors role is to inform, direct, model, and assess those skills.
>
> *Collaborative supervision* is based on the premise that teaching is situational problem solving and decision making. The supervisor's role is to guide the problem-solving process, be active in the discussion, and keep the teacher focused on the problem.
>
> *Nondirective supervision* is based on the premise that learning is an individual experience. Teachers must come up with their own solutions for improving classrooms experiences. The supervisor's role is to listen, be nonjudgemental, provide self-awareness and clarification for teachers. (Glickman, 1990)

Principals interested in determining their own preferred belief system may fill out the Supervisory Beliefs Inventory (see Appendix B) to determine the nature of their beliefs.

Glickman (1990) perceives that a principal's belief system and educational philosophies translate into the following teacher control issues:

Educational Philosophy	**Control**	**Supervisory Belief**
Essentialism	Supervisor high, teacher low	Directive
Experimentalism	Supervisor equal, teacher equal supervisor low	Collaborative
Existentialism	Supervisor low, teacher high	Nondirective

(p. 92)

Although supervision is eclectic in actual practice, general guidelines deserve attention.

1. Regardless of where you start, supervision should strive to shift control for professional growth to teachers.
2. When teachers are unskilled, inexperienced, or unmotivated use a more directive orientation.
3. When teachers are competent and motivated use a more collaborative approach.
4. When teachers are experienced, competent, motivated and can work independently or in a group effectively, use a more nondirective orientation.

8.4 ADMINISTRATIVE DEVELOPMENT

Most researchers agree that the principal determines the effectiveness of the school (Lane & Walberg, 1987). As the leader in the school, the principal plays a major role in initiating activities and in assisting or facilitating with the follow-through. The degree to which the principal attends to these tasks will determine school success. Edmonds' (1979) study indicated that principals of effective schools impact them in the following ways.

> 1. [their] administrative behavior, policies, and practices affect school effectiveness.
> 2. provide a balance between management and instructional skills.
> 3. develop and implement plans for dealing with student's reading problems. (p. 20)

Also, Brookover and Lezotte's (1982) study presents the role of the principal as instructional leader as the catalyst for school improvement. However, the knowledge and skills needed to be effective instructional leaders are not innate; they must be learned. Richardson et al. (1989) state that "a systematically designed and implemented training program has a positive effect on practising principals" (p. 9). Bamburg and Andrews' (1990) study indicated that school districts and

professional associations must develop in-service programs that will provide on-going leadership training and support for practicing administrators.

However, principals must recognize that the role of instructional leadership is inherent to school success. This Handbook will assist in the area of administrative development and should be useful to those principals concerned with instructional leadership.

8.5 CHANGE THEORY

It is commonly understood that most people do not want things to change. Instructional leaders, striving to improve student learning, must be involved in making changes - changes in behaviour or practices and changes in beliefs and understanding. Therefore, it is helpful for the principal to understand the stages that change undergoes.

The Apartment Model of Change Theory as outlined by De Boer (1994), keynote speaker at the South East Saskatchewan Teacher's Convention in Regina, highlights four stages:

1. *Contentment* is what you feel before change is initiated.
2. *Confusion* is what you feel once the questions start to come.
3. *Chaos* is what you feel when answers come.
4. *Self-renewal* is what you feel when answers are settled.

Movement progresses in a such a manner that we may be at different stages on different issues, all at one time. Havelock's (1973) stages of change are similar. However, he incorporates the role of the change agent that acts as catalyst, process helper, resource linker, or solution giver (Figure 2). Although all four change agent roles may be taken by the principal at some stage or other, the change agent as process helper is most useful for the supervisory role. It is a collaborative, on-going role. Following are Havelock's six stages of change.

Stage 1: Building a Relationship (between change agent & client)

Stage II: Diagnosing the Problem
Stage III: Acquiring Relevant Resources
Stage IV: Choosing the Solution
Stage V: Gaining Acceptance
Stage VI: Stabilizing the Innovation and Generating Self-Renewal (p. 11)

This approach promotes collaborative problem solving with the teaching staff to bring about determined, necessary change.

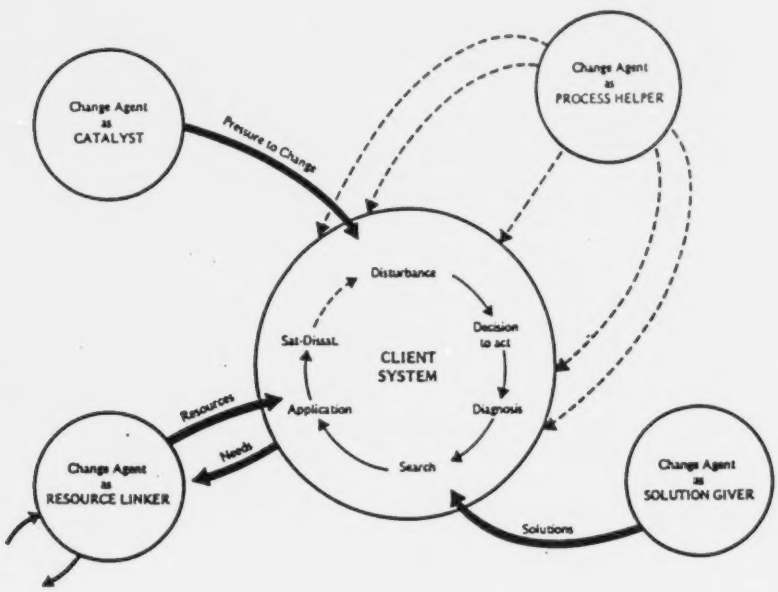

Figure 2. Havelock's (1973) role of change agent as process helper within the process of supervision.

8.6 KNOWLEDGE OF CURRICULUM DEVELOPMENT

At the root of decisions surrounding curriculum lies one's educational philosophy. Hence, even curriculum experts cannot agree as to what is the "right" way for students to be taught nor how learning takes place. "Ultimately, decisions about a good school, appropriate curriculum, and needs of students should be made by those closest to students" (Glickman, 1990, p. 340).

To have realistic teacher expectations concerning curriculum implementation, one should be knowledgeable about three areas of curriculum development:

1. Format: types include behavioral-objective, webbing and conceptual mapping, and results-only.
2. Sources of development: range from teacher developed, to school developed, to provincially developed.
3. Levels of involvement: teachers can be involved at a maintenance level, a development and refinement level, or at an improvement and change level.

The elements of curricula are sequence, continuity, scope, and balance. Knowing that curriculum decisions are based on a philosophy of education, Glickman (1990) identify similarities between certain curriculum formats and specific philosophical bases:

1. *Essentialist philosophy* reflects a behavioural-objective format that emphasizes rote learning, memorization of facts, and academic achievement.

2. *Experimentalist philosophy* reflects a webbing or conceptual-mapping format that emphasizes social activism, trial-and-error learning, and cooperation. Developers integrate many fields of knowledge and modes of learning around a central theme such as art, music, social science, and language.

3. *Existentialist philosophy* reflects a results-only format that emphasizes individual awareness, creativity, and self-exploration. The teacher determines when and how to teach the skills that will produce specified results. (p. 343)

Just as the formats graduate in their appropriateness from lower levels of learning, through the intermediate, to higher levels of learning so, too, they can correspond to the teacher's stage of development. A new teacher with limited experience and practical knowledge may benefit most from a behavioral-objective format. However, the amount of choice given to a teacher must be factored in. The behavioral-objective curriculum may be used as a resource or it may be developed by a particular teacher or staff.

It is important to note, though, that the more specific and detailed a curriculum is, the less choice that is given to teachers to vary instruction according to the situation and vice versa.

Curricula is developed at many levels through outside specialists, school division specialists, school curriculum groups, and teachers working in collaboration. In Saskatchewan, curricula is developed by Saskatchewan Education, Training and Employment with the assistance of advisory and writing committees. Each curriculum is piloted and revised by classroom teachers before being implemented in schools.

Tanner and Tanner (cited in Glickman, 1990) found that teachers become involved in implementing the curriculum at three levels: (a) the imitative-maintenance level [the existing curriculum is followed], (b) the mediative level [the existing curriculum is refined], and (c) the generative level [the curriculum is changed and improved according to the most current knowledge about learning and societal conditions] (p. 352).

Thus, one could conclude that teachers, depending on their abstraction, expertise, and/or commitment, would be involved in implementing the curriculum on different levels. When working with individual teachers, Glickman's (1990) following guidelines deserve consideration.

1. Teachers with a low level of abstraction, expertise, and/or commitment could benefit initially from a highly prescriptive curriculum.

2. Teachers with moderate levels of abstraction, expertise, and commitment could benefit from an eclectic curriculum offering choice of texts, guides,and resources.

3. Highly abstract, committed, and expert teachers can have freedom to pick, choose and create their own plans, based on a carefully thought out philosophy in terms of teaching processes and understanding. (pp. 356-357)

CHAPTER 9: TASKS

9.1 INSTRUCTIONAL EVALUATION/SUPERVISION

One way to help teachers improve instruction is through supervision. A comprehensive guide is found in Glickman's (1990) model of clinical supervision which he presents as a cyclical sequence of events that should, ideally, be implemented at least twice a year. This sequence includes: (a) teacher preconferencing to determine the method, focus, and duration of the observation; (b) classroom observation - methods include categorial frequencies, physical indicators, performance indicators, visual diagramming, space utilization, detached open-ended narratives, participant observation, focused questionnaire and educational criticism; (c) interpretation of observation, either interpersonal or directive analysis/interpretation; (d) postconferencing (see Appendix C) to discuss results and remedial action; and (e) critiquing.

9.2 PEER COACHING

Because teachers often turn to other teachers for assistance, peer supervision has become an alternative method of improving instruction. Principals can help teachers set goals for this program and further assistance could include in-service for teachers in the steps and scheduling of clinical supervision.

9.3 SUPERVISION VS. EVALUATION

Supervision provides direct assistance to teachers as it continuously focuses on improvement of classroom instruction, whereas, formal evaluation periodically measures performance (an acceptable standard of teaching). Popham (cited in Glickman, 1990) and Bird and Little (cited in Glickman, 1990) recommend that supervision and evaluation be performed separately by different

individuals. However, Glickman (1990) believes that both tasks can be performed by the same person if that individual can maintain a relationship of trust and credibility with teachers. Also, the reader is directed to review the complete discussion (Chapter 3; Appendix D) of Dagley and Orso's model (1991) which addresses the issues of supervision and evaluation.

9.4 STAFF DEVELOPMENT

If learning is a life-long pursuit and if our goal is to improve the quality of education, then educators, too, need to be continuously educated. Ways in which educators can receive an on-going education are through school in-service days, workshops, university classes, staff meetings, school visitations, conferences, and travel or professional reading.

Principals can focus a school on instructional improvement through meaningful in-service. Glickman (1990) sums up the elements of effective in-service as:

1. concrete, continual, relevant, and "hands-on" activities
2. follow-up assistance
3. peer observation
4. school leader participation at in-service
5. postobservation analysis and conferencing focused on skills introduced in workshops
6. classroom experimentation and modification of implemented skills
7. release-time provision for teacher leaders
8. individualized activities
9. teacher-planned in-service (pp. 312-313)

When planning for in-service, it is helpful to understand that teachers' thinking concerning in-service topics will vary from concrete to abstract levels. Teachers may view in-service activities as providing information for implementation, as a collaborative venture, or as time to refocus or to be informed. Principals, by respecting and considering these varying levels in teacher thinking

concerning in-service, enable teachers to become "the agents rather that the objects of staff development" (Glickman, 1990, p. 333).

9.5 CURRICULUM IMPLEMENTATION/CORE CURRICULUM

The *Directions* report (Saskatchewan Education, 1980) indicated that Saskatchewan people were, for the most part, satisfied with the educational system. However, it was emphasized that teachers must continue to strive for improved instruction that would enhance student learning and success and, to achieve this, the *Directions* report recommended 16 initiatives, including a core curriculum.

This core curriculum has led to dramatic change in the focus of curriculum development and instruction and in the nature of interpersonal contacts. There has been a distinct move away from static, hierarchical, segregated curriculum to one which is dynamic, egalitarian, and integrated. Also, instructional focus has been redirected from a passive, teacher-directed transmission to a form that is active, transactional, and student-centred. This spirit of change and growth has impacted the nature of interpersonal relationships with movement toward empowerment, cooperativeness, divergent contacts.

Highlights of Saskatchewan's new core curriculum (Saskatchewan Education, 1980) include the following major components.

1. *Required Areas of Study* consist of seven subject areas or courses of study.
2. *Common Essential Learnings* (C.E.L.s) which have been consciously incorporated into new curriculum documents as guidelines and activities.
3. *Adapative Dimension* allows adjustments in approved educational programs to accommodate the diversity of student learning needs.
4. *Locally Determined Options* include other subjects that would enrich the school program. (Saskatchewan Education, 1991, pp. 10-12)

Within this massive undertaking of educational change, the role of the instructional leader has become even more critical. Effective education is a complex issue and, at its core, is the instructional leader who must work with teachers in ways that will effect classroom change.

9.6 GROUP DEVELOPMENT

Learning the skills of working with groups of people to solve instructional problems is critical to effective instructional leadership. Such leadership skills will entail a knowledge of: effective groups, group leadership styles, dealing with dysfunctional members, and resolving conflict. A discussion of each of these areas follows.

1. *Effective groups* consist of (a) the task dimension (content and purpose) and (b) the person dimension (interpersonal process). Productive groups emphasize both dimensions and will have members who play task roles and those who play person roles. If these roles are missing, they may need to be added (either by the principal playing the role or by assigning it to another). Conversely, dysfunctional roles may need to be reduced or eliminated by confronting the (role) dysfunctional member in private (see Appendix E; Figure 2, Chapter 8.5).
2. *Group leadership style*, in which the leader incorporates situational leadership formats, can be utilized when a group is lacking either task or person behaviours. Hersey and Blanchard (1988) matched leadership style to the readiness of the group to achieve peak effectiveness, Figure 3. Lower group readiness requires a more directive leadership approach and, accordingly, higher group readiness requires a more nondirective leadership approach. As the group gains experience, knows each other better, and attains some expertise, it will progress on to a higher stage of readiness. The leader should remain alert to these signals of increasing readiness and

provide for greater group involvement and less leader control by shifting to a less-directive leadership style.

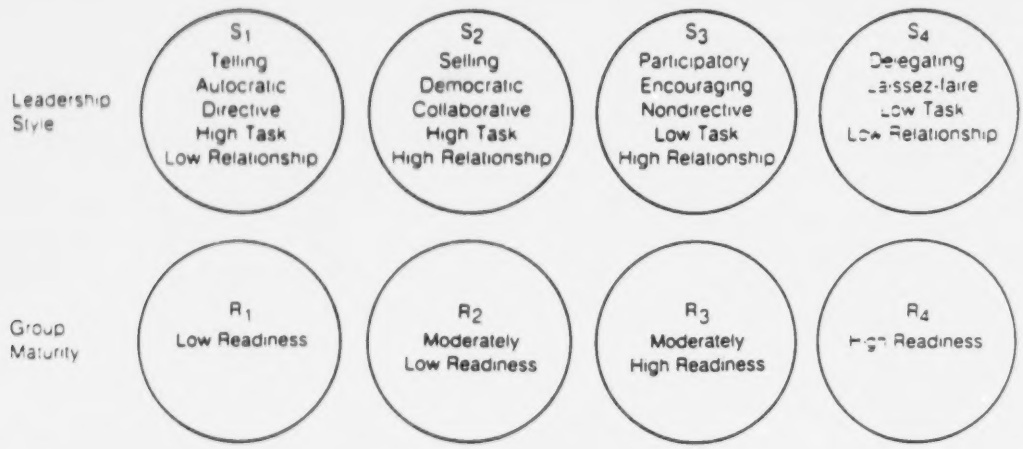

Figure 3. Glickman's (1990) matching and directionality of a developing group.

3. *Dealing with dysfunctional members* is a process that involves private confrontation to: (a) observe and identify the problem, (b) understand root of the problem, (c) talk to member about the problem, (d) establish rules for future behaviours, and (e) redirect unfavourable behaviour. Direct confrontation requires discretion and is best applied in situations where there has been an on-going continuum of negative behaviour.
4. *Resolving conflict* can be a positive, constructive process when handled correctly. The process of resolving conflict generates a greater pool of information and this, when drawn from, can lead to more effective decision making. It is helpful to know that when a disagreement focuses on *ideas*, it can prevent the conflict from becoming adversarial. For example, members in the

conflict could be asked for: (a) a statement of their conflictory position; and, conversely, (b) a restatement of the other's position; (c) [their] underlying value position or "Why do they still stick to their position?"; (d) another position they could assume that may synthesize, compromise, or transcend the conflict; or if there is no such position; then (e) a reclarification of the various positions. In cases where there is no apparent reconciliation, acknowledge this fact and move the discussion on to other matters (Glickman, 1990).

9.7 ACTION RESEARCH

In a school environment, the term *action research* is the research (or studying) that teachers carry out to examine their teaching processes and the results of these processes with the primary focus of improving their instruction. Glickman (1990) outlines one such procedure that teachers can use to research their work. It involves identifying goals; planning, which will include timelines, activities, resources needed, and data that must be collected; evaluating, that will include collecting, assessing, and interpreting the data; and, finally, revising or modifying the original goals (p. 394).

One locally based example of action research is that of the Saskatchewan School Improvement Program which is site based and predicated on shared governance. It exemplifies the developmental progression of decision-making control concerning instructional improvement for students (Saskatchewan Education, 1985).

9.8 POSITIVE SCHOOL CLIMATE

The principal is the key figure in promoting an environment within the school that is conducive to student learning. Such an environment is positive and Buffie (1989) expresses how the school's environment impacts on all, not just the students, by stating that "good teacher morale and

high student achievement go hand-in-hand" (p. 11). According to Buffie, the creation of such a setting does not just happen. It takes the combined effort of both the principal and the staff to identify factors that create and, also, those that inhibit the development of a positive climate. Then, it takes cooperative team work to develop strategies to promote the desired climate or to overcome the inhibiting factors.

9.9 SCHOOL/COMMUNITY INVOLVEMENT

Schools exist in the heart of each community. School-community links are a mutually beneficial relationship in which the principal can play a leading role. The community can assist the learning climate of a school in many ways, for example, in providing direction, in recruiting volunteers to help at school functions, in class presenters, in a mentorship function, and in a sense of stability. Also, it is a recognized fact that student achievement is higher when parents display interest by being actively involved in their children's education. Buffie (1989) suggests ways in which a principal can open the school to community involvement. Parents and community groups can be included in decisions that the school makes. Invitations can be extended for participants in school activities and parents can be encouraged to assume leadership roles. Or, the school can go into the community by composing newsletters to businesses, by visiting senior homes to share stories or perform musically, or by clean-up activities within the community. Such activities promote within students a sense of responsibility and service to their community or, on a larger scale, to their country.

CHAPTER 10: SKILLS NEEDED

To transform knowledge into active behaviour requires the development of interpersonal, leadership, and technical skills. Interpersonal and leadership skills include those of communication, of working effectively with people, of interpersonal relationships and effective supervisory skills, and of group decision making. Technical skills include those of goal setting (envisioning), assessing and planning, observing, research and evaluation. A discussion of each of these areas follows.

10.1 INTERPERSONAL/LEADERSHIP SKILLS

10.1.1 COMMUNICATION SKILLS

Meaningful relationships require clear, reciprocal communication, the product of which is understanding. This occurs through a sharing of thoughts so that both parties agree to a common reality. Typically, 70 to 80% of our waking hours are spent communicating with others. Of the time spent in listening, we will recall approximately one fourth and, of this, there may not be complete understanding. It is critical to give attention to listening skills by focusing on what is said, by listening objectively, by paraphrasing, and by using memory aids for recall.

10.1.2 PEOPLE SKILLS

As principal, one's position entails interrelating with people at all levels. There are members of the school division, the school board, the trustees, the staff, and the students, to mention a few. As the leader who sets the direction of the school, the principal's skills with people are crucial to the success of the position. To develop positive relationships, there are essentially four areas of interpersonal skills that need to be mentioned: trust, motivation, empowerment, and collegiality.

The first, and most important, is that of trust; without this, relationships cannot be built. Secondly, a leadership position involves motivating others and one way to accomplish this is through a process of sharing the decision making. In relationships where power is viewed as reciprocal (as a unit of exchange), people can become committed, significant, and competent through promoting empowerment. As teachers are the players most affected by change, empowerment enables them to identify obstacles and design strategies for dealing with change. The unification that occurs with a common purpose often leads to greater satisfaction and motivation. The fourth skill is that of collegiality. Collegiality promotes idea sharing, project cooperation, and assistance in professional growth, all of which benefit the students.

Buffie (1989), in speaking of creating an environment that promotes collegiality, states it is important for the principal to: (a) provide opportunities for the staff to talk about teaching and learning; (b) encourage teachers to observe each other teaching; (c) involve staff cooperatively in planning, designing, and evaluating curriculum; and, if others are to follow your lead, (d) model these behaviours.

10.1.3 INTERPERSONAL/SUPERVISORY SKILLS

Glickman (1990) outlines four interpersonal approaches which are based on the theory of situational leadership. When working with individuals or groups of teachers, it will require decisive thinking to determine which approach is most suitable for each situation. These approaches range in nature from nondirective, to collaborative, to directive informational, to the strongest - directive control. Appendix F briefly describes the purpose of each approach, the behaviours involved, and the underlying premise to consider when deciding which is the appropriate approach to use.

A collaborative approach is prescribed when individuals or groups have a balanced range of backgrounds (i.e., moderate expertise, low commitment, and high accountability). Three broad generalizations to note are: (a) Experienced teachers prefer the collaborative approach, (b) new teachers initially prefer a directive informational or collaborative approach, and (c) teacher incompetence or situations that involve potential harm to students require use of directive control.

10.1.4 GROUP DECISION-MAKING GUIDELINES

There are skills and guidelines that can be helpful when dealing with group decision making. Basically, there are three categories that describe how decisions are made. Decisions can be concluded unilaterally, consultatively, or collectively as a group decision. A unilateral decision is one that is made without consultation; a consultative decision is one made in consultation with others but ultimately it is made by the leader; and finally, the group decision involves participation by all members of the group in the decision making process and in the decisions reached. Depending on the quality of the decisions required, the time allowed, and the commitment necessary, you will typically choose from one of the above types (Sorenson, McLaren & Skitt, 1994).

Reaching a group consensus can be an onerous task; however, consensus can be facilitated by initially establishing some working guidelines. Firstly, blocking a decision is only allowed if there is a reasonable alternative offered and defended; secondly, habitual blockers must be reminded of the finality of the decision; and thirdly, if they continue to block the process, they will be asked to abstain from participation. Also, when a decision is reached, seventy-five percent of the group should agree and, once made, all participants will support that decision.

10.2 TECHNICAL SKILLS

How does a vision become reality? An effective leader will require, in addition to interpersonal and collaborative skills, knowledge of technical skills that relate to actual practice. Following is a discussion of the practical skills which will include: envisioning, assessment and planning, observation, and research and evaluation.

10.2.1 GOAL SETTING (ENVISIONING)

Change begins with a vision and, as Buffie (1989) explains, "Visioning is that capacity to conceptualize and communicate a desired situation . . . which induces commitment and enthusiasm in others" (p. 12). With a vision, goals are set and direction becomes established. Vision could be regarded as a process that consists of concretely imagining the desired outcomes by setting collective goals, identifying the outstanding barriers, determining strategies for overcoming them, and, finally, identifying and working on the changes needed to achieve these goals.

10.2.2 ASSESSING AND PLANNING

To reach a goal, one must first establish it as a priority and this will require change in the organizational setup. It will entail a change in and a reassessment of supervisory time so that it now includes time for planning for organizational change. But what changes need to occur? What strengths does the organizational structure have that could be built upon; what weaknesses could undermine? What actions should be taken? It is critical to proceed with accurate information of organizational needs. There are numerous ways to be informed. For example, ask the people involved; read official records; speak with an objective third-party; or distribute an open-ended survey, such as a brief questionnaire, to some or all of the stakeholders. Also, to determine areas of

strengths and weaknesses, a check and ranking list can be used. One well recognized guide in this area is that of the Delphi Technique (Glickman, 1990) which combines an open-ended survey with a ranking list to clearly determine priorities.

Once needs have been assessed, planning can proceed in an orderly manner guided by the objectives which have been set and by the activities which have been outlined. Following this, timelines can be set, resources can be determined, and evaluation can take place. Some well-established planning techniques deserve mention. They include: (a) Management By Objectives (MBO), a method which describes explicitly how the goal(s) are to be accomplished; (b) Gant charts that provide a timeline of activities; (c) Program Evaluation and Review Techniques (PERT) which show interrelationships of activities that are needed in a large project; and (d) Planning, Programming, Budgeting System (PPBS) which is a financial accounting system. Instructional improvement plans help one get organized; however, plans can not materialize without action.

10.2.3 OBSERVING

Teachers are the active participants in organizational change. The principal can facilitate change through class observation by providing legitimate, descriptive feedback for the teacher to consider and reflect upon. Keeping in mind that it is better to allow teachers to make their own judgements and reach their own conclusions through a descriptive type of observation than through an interpretive one, the principal will utilize a method of observation, illustrated in Figure 4, that is dependent on the purpose and focus.

Type	Method		Role of Observer			Purpose
	Quantitative	*Qualitative*	*Detached*		*Participant*	
Categorical frequency	X		X			Count Behaviors
Physical indicator	X		X			Evident or not
Performance indicator	X		X			Evident or not
Visual diagramming	X		X			Picture verbal interaction
Space utilization	X		X			Picture movement
Detached open-ended narrative		X	X			Attention to unfolding event
Participant open-ended observation		X			X	Inside-out view
Focused questionnaire		X	X	or	X	Focus on particular events
Educational criticism		X	X	or	X	Meaning to participants

Figure 4. Glickman's (1990) observation techniques dependent on outcome using a quantitative/qualitative methodology.

10.2.4 RESEARCH AND EVALUATION

As principal, one must critically question the success of the instructional programs and determine what changes need to occur. Glickman (1990) cautions that:

> Decisions about instructional changes should be made from a base of comprehensive and credible data about students and that those affected most directly by instructional change [i.e., teachers] should be involved in defining, implementing and interpreting the research and evaluation agenda. (p. 253)

A comprehensive evaluation can provide information regarding the success of instructional programs, but evaluation outcomes vary and it is important to recognize that the outcomes will determine which type of evaluation will be implemented. Glickman (1990) outlines the functions of three kinds of evaluations. The *fidelity or implementation evaluation* basically examines whether the

program took place as planned; the *product or outcome evaluation* determines achievement of objectives; and the *serendipitous evaluation* examines unforseen consequences (p. 255). It is important to select instruments that will measure what it is that you want to assess, keeping in mind that decisions regarding instructional change should be made using multiple sources of data.

CHAPTER 11: CONCLUSION

Learning to become an instructional leader is a complex, multidimensional task. If principals believe that growth in student learning is the primary goal of schooling, then it is a task worth learning. In today's rapidly changing world that means becoming a leader of leaders by learning and working with teachers, students, and parents to improve instructional quality. Goal setting and problem solving become site-based, collective collaborative activities. The leadership of the principal is pivotal in ensuring that the process is informed of all school issues, especially those which relate to student instruction.

There are three major areas where learning is required if a principal is to become an instructional leader: a knowledge base, task understandings, and appropriate skills. The knowledge base includes the research on effective schools and teaching, on instructional administration, and familiarity with the processes of change. Also, one should understand educational philosophies and beliefs and, ultimately, be able to determine the strengths and weaknesses of one's own philosophy.

Instructional leadership tasks relate to the knowledge base and are varied. They include supervision and evaluation of instruction, staff development activities, curriculum development knowledge and activities, group development knowledge and activities, action research, development of a positive school climate, and the creation of links between school and community.

To carry out these tasks, the principal must possess critical interpersonal and technical skills. Interpersonal skills include those of communication, motivation, decision making, problem solving, and conflict management. Technical skills include ways to approach goal setting, assessment and planning (to implement goals), instructional observation (to provide feedback to teachers) and research and evaluation (to determine the success of instructional progress) (Figure 1, Chapter 7).

If a principal possesses this background, he/she will likely become an effective leader of leaders - sharing, facilitating, and guiding decisions about instructional improvement for the betterment of children's education. Instructional improvement is an important goal, a goal worth seeking, and a goal, when implemented, that allows both students and teachers to control their own destiny in making a more meaningful learning environment.

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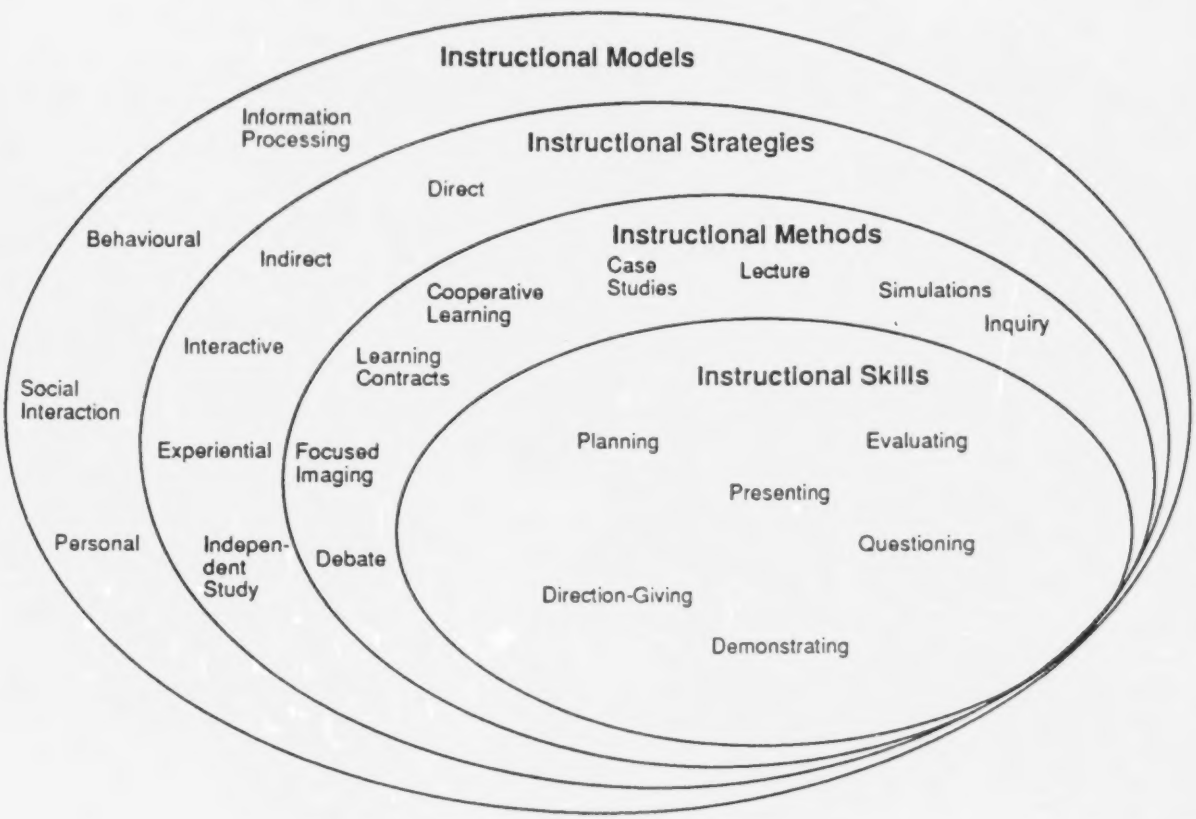
APPENDIX A

Instructional Framework

Instructional Framework



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APPENDIX B

Supervisory Beliefs Inventory

Supervisory Beliefs Inventory

This inventory is designed for supervisors to assess their own beliefs about teacher supervision and staff development. The inventory assumes that supervisors believe and act according to all three of the orientations of supervision, but that one usually dominates. The inventory is designed to be self-administered and self-scored. Supervisors are asked to choose on of two options. A scoring key follows.

Instructions: Circle either A or B for each item. You may not completely agree with either choice, but choose the one that is closest to how you feel.

1. A. Supervisors should give teachers a large degree of autonomy and initiative within broadly defined limits.

   B. Supervisors should give teachers directions and methods that will help them improve their teaching.

2. A. It is important for teachers to set their own goals and objectives for professional growth.

   B. It is important for supervisors to help teachers reconcile their personalities and teaching styles with the philosophy and direction of the school.

3. A. Teachers are likely to feel uncomfortable and anxious if the objectives on which they will be evaluated are not clearly defined by the supervisor.

   B. Evaluations of teachers are meaningless if teachers are not able to define with their supervisors the objectives for evaluation.

4. A. An open, trusting, warm, and personal relationship with teachers is the most important ingredient in supervising teachers.

   B. A supervisor who is too intimate with teachers risks being less effective and less respected than a supervisor who keeps a certain degree of professional distance from teachers.

5. A. My role during supervisory conferences is to make the interaction positive, to share realistic information, and to help teachers plan their own solutions to problems.

   B. The methods and strategies I use with teachers in a conference are aimed at our reaching agreement over the needs for future improvement.

6. In the initial phase of working with a teacher:

   A. I develop objectives with each teacher that will help accomplish school goals.

B. I try to identify the talents and goals of individual teachers so they can work on their own improvement.

7. When several teachers have a similar classroom problem, I prefer to:

A. Have the teachers form an ad hoc group and help them work together to solve the problem.

B. Help teachers on an individual basis find their strengths, abilities, and resources so that each one finds his or her own solution to the problem.

8. The most important clue that an in-service workshop is needed occurs when:

A. The supervisor perceives that several teachers lack knowledge or skill in a specific area, which is resulting in low morale, undue stress, and less effective teaching.

B. Several teachers perceive the need to strengthen their abilities in the same instructional area.

9. A. The supervisory staff should decide the objectives of an in-service workshop since they have a broad perspective on the teachers' abilities and the school's needs.

B. Teachers and supervisory staff should reach consensus about the objectives of an in-service workshop before the workshop is held.

10. A. Teachers who feel they are growing personally will be more effective than teachers who are not experiencing personal growth.

B. The knowledge and ability of teaching strategies and methods that have been proved over the years should be taught and practised by all teachers to be effective in their classrooms.

11. When I perceive that a teacher might be scolding a student unnecessarily:

A. I explain, during a conference with the teacher, why the scolding was excessive.

B. I ask the teacher about the incident, but do not interject my judgements.

12. A. One effective way to improve teacher performance is to formulate clear behavioral objectives and create meaningful incentives for achieving them.

B. Behavioral objectives are rewarding and helpful to some teachers but stifling to others; some teachers benefit from behavioral objectives in some situations but not in others.

13. During a preobservation conference:

    A. I suggest to the teacher what I could observe, but I let the teacher make the final decision about the objectives and methods of observation.

    B. The teacher and I mutually decide the objectives and methods of observation.

14. A. Improvements occurs very slowly if teachers are left on their own; but when a group of teachers work together on a specific problem, they learn rapidly and their morale remains high.

    B. Group activities may be enjoyable, but I find that individual, open discussion with a teacher about a problem and its possible solutions leads to more sustained results.

15. When an in-service or staff development workshop is scheduled:

    A. All teachers who participated in the decision to hold the workshop should be expected to attend it.

    B. Teachers, regardless of their role in forming a workshop, should be able to decide if the workshop is relevant to their personal or professional growth and, if not, should not be expected to attend.

Scoring Key

Step 1 Circle your answer from the inventory in the following columns:

Column I	Column II	Column III
1B	1A	
	2B	2A
3A	3B	
4B		4A
	5B	5A
6A		6B
	7A	7B
8A		8B
9A	9B	
10B		10A
11A		11B
12A	12B	
	13B	13A
14B	14A	
	15A	15B

Step 2 Tally the number of circled items in each column and multiply by 6.7

2.1 Total response in column I ____ X 6.7 = ____

2.2 Total response in column II ____ X 6.7 = ____

2.3 Total response in column III ____ X 6.7 = ____

Step 3 Interpretation: The product you obtained in Step 2.1 is an approximate percentage of how often you take a directive approach to supervision, rather than either of the other two approaches. The product you obtained in Step 2.3 is an approximate percentage of how often you take a collaborative approach, and that in Step 2.3 and approximate percentage of how often you take a nondirective approach.

Glickman, C. (1990). *Supervision of instruction: A development approach* (2nd. ed.), pp. 88-91.

APPENDIX C

Plan for Instructional Development

Plan for Instructional Development

Postconference Date _____Observed Teacher_____

Time_____Peer Supervisor_____

Objective to be worked on:

Activities to be undertaken to achieve objectives:

Resources needed:

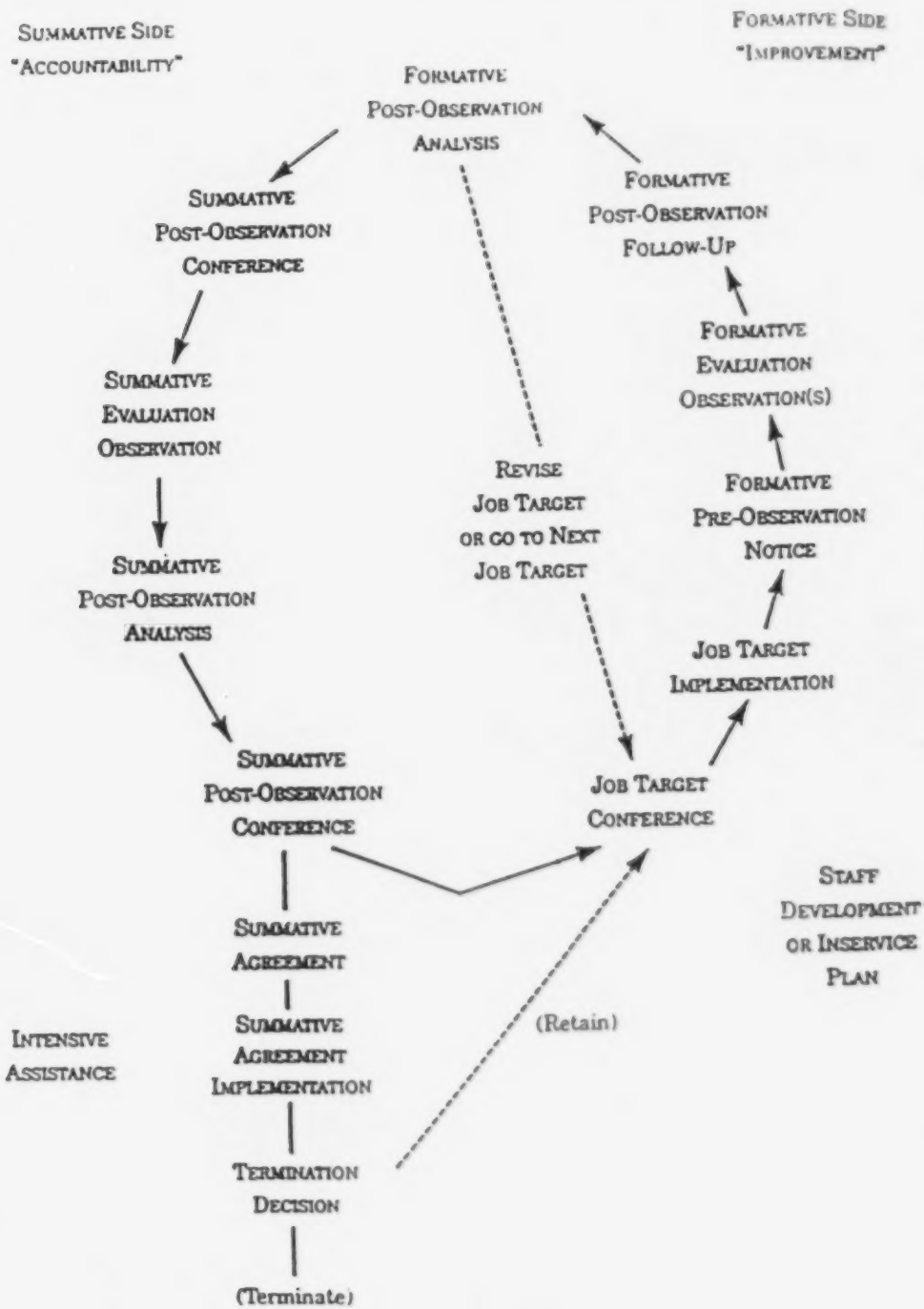
Time and date for next preconference:

Glickman, C. (1990). *Supervision of instruction: A development approach* (2nd ed..) p. 284

APPENDIX D

The Five Steps of Clinical Supervision

The Five Steps of Clinical Supervision



Dagley, D., & Orso, J. (1991). *Integrating summative, formative modes of evaluation.* p. 74

APPENDIX E

Group Roles

Group Roles

Task Roles

Initiator-contributor: Proposes original ideas or changed ways of regarding group problem of goal or procedure. Launches discussion, moves group in to new areas of discussion.

Information seeker: Asks for clarification in terms of factual adequacy. Seeks expert information and relevant facts.

Opinion seeker: Asks for clarification of values pertinent to the group undertaking or to propose suggestions. Checks on other's attitudes and feelings toward particular issues.

Information giver: Provides factual, authoritative information or gives own experience relevant to the issue.

Opinion giver: Verbalizes his or her own values and opinions on the group problem emphasizes what the group should do.

Elaborator: Picks up on other's suggestions and amplifies with examples, pertinent facts, and probable consequences.

Coordinator: Shows the link between ideas and suggestions, attempts to pull diverse proposals together.

Orienter: Clarifies the group's position, gives a state-of-the-scene review. Summarizes what has been discussed, points out where discussion has departed from the goal,and reminds the group of their ultimate goal.

Evaluator-critic: Evaluates the proposals of the group against a criteria of effectiveness. Assess whether proposals are "reasonable," "manageable," "based on facts," and derived through fair procedures.

Energizer: Focuses the group to move toward decisions. Challenges and prods group into further action.

Procedural technician: Facilitates group discussion by taking care of logistics. Sees that the group has the necessary materials for the task (paper, pencils, chalk, and so on).

Recorder: Writes down the group's suggestions and decisions. Keeps an ongoing record of what transpires in the group.

Person Roles

Encourager: Affirms, supports, and accepts the contribution of other members. Shows warmth and a positive attitude toward others.

Harmonizer: Conciliates differences between individuals. Looks for ways to reduce tension between members through non-threatening explanations and humour.

Compromiser: Offers to change his or her proposals for the good of the group. Willing to yield position or to acknowledge own errors by meeting other opposing ideas halfway.

Gatekeeper or expediter: Regulates flow of communication by seeing that all members have a chance to talk. Encourages quiet persons to speak and puts limits on those who dominate the conversation. Proposes new regulations for discussions when participation becomes unbalanced.

Standard setter, ego ideal: Appeals to group's pride by not letting group members give up when trouble occurs. Exudes confidence that the group is a good one and can make sound decisions.

Observer and commentator: Monitors the working of the group. Records who speaks to whom, where and when most roadblocks occur, and the frequency and length of individual members' participation. Provides feedback when the group wishes to evaluate its procedures and processes.

Follower: Is willing to accept the decisions of the group and follow them even though he or she has not been active or influential in those decisions. Serves as a listener to group discussion.

Dysfunctional Roles

Aggressor: Personally attacks the worth of other members. Belittles and deflates the status, wisdom, and motivation of others. Examples of such verbal attacks are, "That's the most ridiculous thing I've ever heard," "You must be crazy to suggest....".

Blocker: Sees all opinions and suggestions by group members as negative. Opposes any decision being make and stubbornly refuses to propose alternative. Examples of such blocking statements are: "That's a terrible idea," "I don't want to do that," "It's futile to do anything."

Recognition-seeker: Uses the group setting to receive personal attention. Examples of such behaviours are dropping books, scattering papers, coughing incessantly, pretending to be asleep, raising hand and then forgetting what one would have said.

Self-confessor: Uses the group to ventilate personal feelings not related to the group's tasks. Talks about personal problems or feelings of inadequacy whenever he or she can see ways to slip such confessions into the group discussion. Examples of self-confessing statements are, "This

discussion reminds me of when I was a little child and the weight problem I had," or when the group is talking about differences of opinion, "You should hear my son and me fight; I don't know what to do about him."

Playboy or playgirl: Displays lack of interest and involvement by using the group setting to have a merry time. Distracts other members from the group's purpose. Tells private jokes, passes notes, makes faces at others, plays cards, and so on.

Dominator: Asserts superiority in controlling group discussion and dictates what certain members should do. Claims to know more about the issue under discussion and have better solutions than anyone else. Has elaborate answers to almost every question and monopolizes the discussion.

Help-seeker: Tries to gain group's sympathy by expressing feelings of inadequacy or personal confusion. Uses such self-derogation as reason for not contributing: "This is all too confusing for me," "I can't make a decision on my own," "Why ask me? I can't help."

Special-interest pleader: Has no opinion or suggestions of his or her own but instead speaks for what others would say or do. Cloaks own bias by using an outside group: "We couldn't do that. Do you know what the school board would think?" "If those parents down in the local restaurant ever heard that we were going to change...."

Dagley, D., & Orso, J. (1991). *Integrating summative, formative modes of evaluation.* p. 74

APPENDIX F

Interpersonal/Supervisory Approaches

Interpersonal/Supervisory Approaches

1. Interpersonal/Supervisory Approach: Non-Directive

   Underlying Premise: teachers are able to determine their own plans with some assistance
   Behaviours Used: listening, reflecting, clarifying, encouraging, problem-solving
   When to Use this Approach: when individual or group posses greater expertise, commitment and responsibility for a decision than you do
   Purpose of this Approach: provide an active sounding board for reflective teachers

2. Interpersonal/Supervisory Approach: Collaborative

   Underlying Premise: decisions are arrived at jointly
   Behaviours Used: clarifying, listening, reflecting, presenting, problem solving, negotiating and standardizing
   When to Use this Approach: when teachers and principals have similar levels of expertise, involvement and concern with problem
   Purpose of this Approach: provides for cooperative, equal decision-making

3. Interpersonal/Supervisory Approach: Directive Informational

   Underlying Premise: principal is source of wisdom
   Behaviours Used: giving of information, goal articulation, suggested practices, solicit teacher input
   When to Use this Approach: when expertise of confidence and credibility of principal clearly outweigh teachers
   Purpose of this Approach: directs teacher(s) to choose from given alternatives

4. Interpersonal/Supervisory Approach/Directive Control

   Underlying Premise: hierarchical control
   Behaviours Used: presenting, clarifying, listening, problem-solving directing standardizing and reinforcing (with line authority) Flow is from principal to teacher
   When to use this Approach: when teachers possess little expertise, involvement or interest with respect to as instructional problem and time is short or in an emergency
   Purpose of this Approach: compliance gained and useful only in limited circumstances

Glickman, C. (1990). *Supervision of instruction: A development approach* (2nd ed.). p. 375